

2025 BUSINESS OFFERINGS

PROJECT ASSESSMENT INCENTIVE GUIDE



INTRODUCTION & HOW TO APPLY



The FOCUS ON ENERGY® Project Assessment Incentive (PAI) is designed to share a customer's investment in the external costs of a detailed engineering study of an energy efficiency opportunity, including biogas and biomass projects, so that an investment decision can be made.

PAI DETAILS

- Requires pre-approval in writing from Focus on Energy before the study begins.
- Approved incentive will be the lesser of 50% of the total assessment cost, or 20% of the potential annual energy savings*; up to \$15,000.
- Multi-phase studies will receive incentive after all phases are completed.
- Projects being studied must result in savings of utility-provided electricity or natural gas at the study site (e.g., biogas for pipeline injection or use in fleet vehicles are not eligible study subjects).
- New Construction projects, prescriptive projects, or projects already pre-approved for Focus on Energy incentives are not eligible for PAI funding.
- Eligible Facilities Include: Industrial, Commercial, Schools, Government, and Agriculture.

**Does not apply to biogas or biomass projects.*

step 1 BEFORE YOU APPLY

- Confirm your gas and/or electric utilities participate in Focus on Energy at focusonenergy.com/utilities.
- Contact your Focus on Energy Advisor for assistance. If you do not know who your Energy Advisor is, go online at focusonenergy.com/EA-map or call 800.762.7077 for assistance.

step 2 WHAT YOU'LL NEED

- PAI application with all sections of this form completed.
- A proposal detailing the following:
 - Description of what the study will assess and why.
 - The work to be performed.
 - A list of deliverables for the final report, including:
 - Summary of findings, including statements on barriers and project feasibility.
 - Energy and cost-savings estimates along with supporting calculations and materials.
 - Project cost estimates.
 - Plan for implementation should the study result in a custom project.
 - Any data collected and used in the assessment.
 - Experience and qualifications of the feasibility study provider for biogas and biomass projects.

step 3 APPLICATION PROCESS

Approval for this offering is contingent upon receipt of necessary documentation, including the completed application, proposal, and supporting materials for potential energy and energy-cost-savings estimates. Once your application is approved, the Program will notify you in writing to confirm approval and specify next steps.

step 4 COMPLETE THE ASSESSMENT

- Complete the assessment by the completion deadline indicated on your application.
- Provide the following required documentation to your Energy Advisor:
 - A copy of the final report that meets the report requirements in **Appendix A**.
 - Final invoice for the assessment.
- Focus on Energy reserves the right to visit the potential project site to verify reported information.
- Meet with a Focus on Energy Advisor to discuss assessment findings, potential projects, and available Focus on Energy incentives.
- If the customer decides not to move forward with any projects after the assessment, customer must provide a written explanation to Focus on Energy explaining why.

All items identified above are required before incentive payment will be issued.

INCENTIVE APPLICATION

FOR PROJECTS COMPLETED BY 12/31/2025



section 1

ACCOUNT AND CUSTOMER INFORMATION

Tax Identification Number (Check one) FEIN or SSN

If you use a Social Security Number (SSN) as your Tax Identification Number, **do not provide it below.** You will be contacted by the Program via email to provide a copy of your W-9 using a secure online portal, if it is not already on file. **You must list an email address in Section 3.**

FEIN _____

TAX CLASSIFICATION OF CUSTOMER

(Check one. Required for all businesses, including non-profits.)

- Sole Proprietorship S Corporation Partnership
 C Corporation LLC - S Corp LLC - Partnership
 LLC - C Corp Single-Member LLC
 Other _____

OWNER NAME (REQUIRED IF SSN IS USED AS TAX IDENTIFICATION NUMBER) _____

COMPANY NAME _____

LEGAL ADDRESS (AS SHOWN ON COMPANY W-9) _____

CITY _____ STATE _____ ZIP _____

WHO DID YOU WORK WITH FROM FOCUS ON ENERGY? (CONTACT NAME) _____

section 2

JOB SITE INFORMATION

(Refer to your utility bills for account numbers below.)

JOB SITE BUSINESS NAME _____

ELECTRIC UTILITY AT JOB SITE _____ ELECTRIC ACCOUNT # _____

GAS UTILITY AT JOB SITE _____ GAS ACCOUNT # _____

- JOB SITE ADDRESS IS SAME AS LEGAL ADDRESS
 JOB SITE ADDRESS IS DIFFERENT (COMPLETE BELOW)

JOB SITE ADDRESS _____

CITY _____ STATE _____ ZIP _____

section 3

CUSTOMER CONTACT INFORMATION

JOB SITE CUSTOMER CONTACT NAME _____

PRIMARY PHONE # _____ EMAIL ADDRESS _____

Preferred method of contact: Call Email Text

If Focus on Energy has a question about this application, we should contact: Customer Trade Ally Other _____

section 4

TRADE ALLY INFORMATION

TRADE ALLY CONTACT NAME _____

PRIMARY PHONE # _____ EMAIL ADDRESS _____

TRADE ALLY COMPANY NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

section 5

BUSINESS PAYMENT INFORMATION

Payee is responsible for any associated tax consequences.

Make incentive check payable to:

- Customer Trade Ally Other Payee Rebate Administrator
If Other Payee is selected, the relationship to the utility account holder must be identified below:
 Tenant Building Owner Other (specify) _____

For All Payees this Section MUST be Filled Out

- Mail check to:** Customer Legal Address Job Site Address
 Trade Ally Address Alternate Address

COMPANY NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

ATTENTION TO (OPTIONAL) _____

For Trade Ally, Rebate Administrator, and Other Payees

Trade Allies must be registered with the Program and have a current W-9 on file to receive payment.

Tax Identification Number (Check one) FEIN or SSN

If you use a Social Security Number (SSN) as your Tax Identification Number, do not provide it below. You will be contacted by the Program via email to provide a copy of your W-9 using a secure online portal, if it is not already on file. You must list an email address below.

FEIN _____

Tax Classification of Payee

(Check one. Required for all businesses, including nonprofits.)

- Sole Proprietorship S Corporation Partnership
 C Corporation LLC - S Corp LLC - Partnership
 LLC - C Corp Single-Member LLC
 Other _____

Payee Contact Information

NAME _____ EMAIL ADDRESS _____

section 6

DESCRIPTION OF ASSESSMENT

Provide a brief description of what the project assessment intends to study:

section 7

ASSESSMENT INFORMATION

- A) What is the total cost of the assessment? _____
- B) Potential Annual Energy-Cost-Savings Estimate - This estimate is based on information known before the assessment. Indicate the estimated potential savings here and attach information supporting this estimate. \$ _____
- C) Requested Incentive (lesser of 50% of assessment cost or 20% of potential energy cost savings*, up to \$15,000) \$ _____
**Does not apply to biogas or biomass projects.*
- D) What is the anticipated completion date of the assessment? _____
- E) If the project(s) found in the assessment are to be implemented, what is the anticipated completion date? _____

section 8

APPLICATION CHECKLIST

- Proposal. Supporting materials for estimated energy and energy cost savings.

section 9

CUSTOMER SIGNATURE

I, the Customer, attest that I am the ratepayer (utility account holder) for the site(s) listed in Section 2. If applicable, I assign the right to participate in and receive incentives from the Focus on Energy Program to the Other Payee identified in Section 5.



CUSTOMER SIGNATURE

NAME (PRINT)

DATE

Submit applications and supporting documentation to:

MAIL: Focus on Energy
725 W. Park Avenue
Chippewa Falls, WI 54729

E-MAIL: business@focusonenergy.com

PARTICIPATION REQUIREMENTS

NEED HELP? Call **800.762.7077**



Before you start your project, please make sure you are familiar with participation requirements, program information, and Terms and Conditions.

INFORMATION AND REQUIREMENTS

General Terms and Conditions

Review the Focus on Energy Terms and Conditions at focusenergy.com/terms or call **800.762.7077** to request a copy.

Incentive Limits

Incentives are limited to \$300,000 per project and \$400,000 per customer per calendar year for all Focus on Energy incentives (prescriptive and custom). Depending on the business tax classification of the payee, the entity receiving the incentive payment may receive IRS form 1099 for incentives totaling over \$600 in a calendar year.

Trade Ally Information

A Trade Ally represents the company who provided/installed the equipment for a project or performed the service for which a Customer is seeking an incentive. Trade Allies who have signed an agreement with Focus on Energy are allowed to enjoy certain program benefits, one of which is to receive direct payment of incentives at the Customer's request. Incentives can only be paid directly to a registered Trade Ally who has a W-9 on file with Focus on Energy. For more information on becoming a registered Trade Ally, visit focusenergy.com/tradeally.

The Federal Employer Identification Number (FEIN) and Tax Classification of the Trade Ally is required when the incentive is paid directly to the Trade Ally. In this scenario, the credit must be clearly labeled as the Focus on Energy incentive and deducted from the amount due on the Customer's invoice.

If your project was completed by more than one Trade Ally (example, equipment was purchased from one Trade Ally but installed by another Trade Ally) and the incentive is being paid to you the Customer, enter the information of the Trade Ally who installed your equipment in Section 4: Trade Ally Information. If the equipment was self-installed, enter the information of the Trade Ally from whom you purchased the equipment.

Assignment of Incentives to Other Payee

The Customer for the project site listed on the application may assign their right to participate and receive incentives to Other Payee. The Customer must sign Section 9 and identify the Other Payee in Section 5.

APPENDIX A: FINAL ASSESSMENT REPORT REQUIREMENTS

Assessment reports must comply with the guidelines below before the Project Assessment Incentive will be paid.

A. Cover Page

- a. Customer name and site information (facility name, address, etc.).
- b. System being assessed (anaerobic pretreatment, compressed air, process steam, biogas, etc.).
- c. Consulting firm/engineering group information.
- d. Report date.

B. Executive Summary Table

- a. High level description of the assessment results.
- b. A table form of the energy saving measures identified including:
 - i. Projected reduction in kW, kWh, and/or therms.
 - ii. Annual cost savings.
 - iii. Estimated total project cost.
 - iv. Simple payback.

C. Body of Report

- a. Customer background along with system being assessed.
- b. Analysis of any data collected (measured data, equipment specifications, project flow diagrams, etc.).
- c. Existing system description, operating parameters, and projected energy consumption.
- d. Assessment findings and recommendations.
- e. Proposed system information:
 - i. Project scope details.
 - ii. Energy saving projections and calculations (see section D for guidance).
 - iii. Project cost estimates.
 - iv. Payback calculations.
 - v. For biogas, detailed description of how the biogas will be measured and treated prior to beneficial utilization.

D. Calculation Analysis

- a. Provide calculation methodology along with formulas used to determine energy savings.
- b. Calculation assumptions and input variables must be clearly stated along with justification reasoning.
- c. Demand savings (kW), electric energy consumption (kWh), and natural gas usage (therms) should be calculated separately (if applicable).
- d. All associated parasitic energy uses must be presented and accounted for (if applicable).
- e. Energy costs used in calculations must match the customer's utility bill.
- f. Simple payback is based on total project cost for energy saving measure divided by energy cost savings.
- g. For biogas/biomass projects, calculations for estimated annual energy production/utilization or increase in value must be provided.
- h. Buy-back rates from the utility must be clearly stated (if applicable).
- i. Energy savings should be normalized for weather. Weather data used should be "bin type" values compiled over multiple years and the data source must be accessible during review process.

**For more information,
call 800.762.7077
or visit focusonenergy.com**

REDUCING ENERGY WASTE ACROSS WISCONSIN

Focus on Energy, Wisconsin utilities' statewide program for energy efficiency and renewable energy, helps eligible residents and businesses save energy and money while protecting the environment. Focus on Energy information, resources, and financial incentives help to implement energy efficiency and renewable energy projects that otherwise would not be completed.

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